



SCOTTISH  
TOURISM  
ALLIANCE

Your voice in tourism matters

# SCOTLAND OUTLOOK 2030



Responsible tourism for a sustainable future.

Marc Crothall MBE  
CEO, Scottish Tourism Alliance  
Co-Chair , Tourism & Hospitality Industry Leadership Group

@St\_alliance



TOURISM BUSINESSES

## CONFIDENT OR CONCERNED?

REPORT ON THE FACTORS  
AFFECTING TOURISM BUSINESSES IN  
SCOTLAND

THE SCOTTISH TOURISM ALLIANCE  
WWW.SCOTTISHTOURISMANLLIANCE.CO.UK  
SEPTEMBER 2017



## Scots tourism sector 'gazing over a cliff' warns expert



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## Scottish tourism sector facing "unprecedented" challenge

Key research project announced to assess sector's rising costs

15/03/2017

→ What's your view on this? Post your comments here:



The Scottish Tourism Alliance

SCOTTISH TOURISM INDUSTRY  
RECOMMENDATIONS TO THE  
SCOTTISH GOVERNMENT  
BUDGET & SPENDING REVIEW



**THE STA LOBBY AGENDA REMAINS FIRMLY ON THE IMMEDIATE, CONCERNS AND CHALLENGES THE INDUSTRY IS FACING, SEEKING TO INFLUENCE THE RIGHT POLICY ENVIRONMENT POLICY APPLICATION AND THE WIDER CONDITIONS FOR SUCCESS EXIST SO THAT BUSINESS' CAN RECOVER , BUILD RESILIENCE, INVEST AND STAY COMPETITIVE.**

## **THE CURRENT HEADLINE AREAS OF OUR FOCUS**

- The Rising Costs of Doing Business
  - Staying Competitive (Product, Quality Price)
  - STL, DRS, TVL Balancing the future impact
  - Economic Uncertainty – Global & Local
  - Skills and Labour Availability
  - Transport & Housing Infrastructure
  - Financing and driving innovation
  - Financial Sustainability & Efficiency
- <https://scottishtourismalliance.co.uk/summary-of-position-statements/>

# New Deal4Business Working Group 4 Priority Areas

- 1. Shared awareness of the economic and business environment** – to ensure Scottish businesses are resilient, and able to capitalise on investment and trade, maximise economic opportunities within Scotland as well as thrive internationally and to contribute to the mission and targets outlined in the National Strategy for Economic Transformation (NSET).
- 2. Developing the best environment to do business** – to ensure our skills pipeline, talent availability, business support, tax and regulatory framework are attractive to business and industry and helping to create the best possible enabling business environment. This workstream will consider the findings of the relevant sub-group on further enhancements to the Non-Domestic Rates system.
- 3. Enhanced partnership working** – build on the Joint Principles Agreement to work better with business across all tiers of government including co-production where feasible, ensuring impact on business are identified and picked up early and policy aligned accordingly across SG policy areas. Build relationships to ensure private sector picks up its share in supporting the delivery of the priority areas that the government is seeking to pursue for the nation.
- 4. Contribution to a Wellbeing Economy** – build on the principles of an economy that has wellbeing at its heart, built on the principle of equity, diversity and inclusion with fairness at the core and being positively clear on the important contribution and role of business in the delivery for Scotland's prosperity.



# New Deal4Business Focus Sub-Groups

## **1 Regulatory Review Sub-Group**

**This is the existing Joint Regulatory Taskforce which is chaired by Mr Lochhead and Councillor Macgregor**

**New Deal for Business Group Lead - Colin Borland, FSB**

**Scottish Government Lead – John Paul Liddle, Deputy Director for Business Support Policy and Governance**

This subgroup aim is to agree processes in place to improve regulation, including proper assessment of the cumulative impact of regulation on business ; a revised and improved approach to Business Regulatory Impact Assessments; to be taken forward by the relaunched Regulatory Review Group with clear scope and membership though the Joint Regulatory Taskforce.

## **2 Business Partnership Sub-Group**

**New Deal for Business Group Lead - Iain Baxter, SFD**

**Scottish Government Lead – Lisa McDonald, Deputy Director, Strategic Economic and Business Engagement Division**

A shared agreement and commitment on how SG will not just communicate, but also work in partnership with business on policy development from the earliest stages to ensure that the cumulative impact of policy on businesses is fully understood and that policy implementation is effective and proportionate.

# New Deal4Business Focus Sub-Groups

## **3 Non-Domestic Rates Sub-Group**

**Chaired by the Minister for Community Wealth and Public Finance**

**New Deal for Business Group Lead - Liz Cameron, SCC**

**Scottish Government Lead – Ellen Leaver, Deputy Director, Local Government and Analytical Services Division**

This subgroup will be a consultative sub-group, chaired by the Minister for Community Wealth and Public Finance, to advise on further enhancements to the operation and administration of the Non-Domestic Rates system following the final implementation of the independent Barclay Review of NDR on 1 April 2023. It will also be important to ensure that public sector experts including those who collect and administer non-domestic rates - local authorities – are invited to attend this subgroup’s meeting as well given the local, and technical, nature of NDR.

## **4 Wellbeing Economy Sub-Group**

**New Deal for Business Group Lead - Louisa Macdonell, BITC, Nathalie Agnew Muckle Media, BiTC and Sara Thiam, SCDI**

**Scottish Government lead – Lisa McDonald, Strategic Economic and Business Engagement Division**

The subgroup will develop a shared appreciation and articulation of how business contributes to a Wellbeing Economy and SG Missions and agreement on key areas where we will actively work together in partnership with business to maximise this. Examples here could include maximising and promoting Investment (a Wellbeing Economy Indicator); improving the health of our workforce; Skills; Circular Economy; and Supporting Parents into Work.

# New Deal4Business Working Group

## 5 Sharing Key Metrics Sub-Group

**New Deal for Business Group Lead- Sandy Begbie, SFE**

**Scottish Government Lead – Strategic Economic and Business Engagement Division & Kathy Johnston OCEA**

The subgroup is to propose an agreement on collating and sharing key metrics and real-time evidence across different sectors. Identify Sectors 3 to 5 year strategies in order to drive and shape the data and metrics. Ensure that SG works alongside Enterprise Agencies, Skills Development Scotland, Local Government and business to deliver emerging domestic and international opportunities including clarity on sector strategies. This will allow the Scottish Government to flex policy in response to changes in the business climate, but also ensure that SG, Local Government, Enterprise Agencies, Skills Development Scotland and business are aware of emerging domestic and international opportunities. Many of your organisations will have your own data and sectoral intel so this is about bringing a bit of a framework for ensuring the information is shared with government in a timely fashion



# RESPONDING TO A CHANGING WORLD

SCOTLAND  
OUTLOOK **2030**  
Responsible tourism for a sustainable future.





# THE MEGATRENDS PRE-COVID HAVE NOT REALLY CHANGED.

Experience  
More



Limitless  
Discoveries



The Evolving  
Traveller



Technology  
to Stimulate





# SCOTLAND OUTLOOK 2030

Responsible tourism for a sustainable future.



A person stands on a mountain peak with arms raised against a hazy sky. The background shows a vast, misty landscape with rolling hills and a body of water in the distance. The overall tone is inspirational and aspirational.

SCOTLAND HAS AN AMBITIOUS SHARED VISION THAT  
HAS NOT CHANGED EITHER AND THAT IS FOR

SCOTLAND TO BE THE WORLD LEADER  
IN 21<sup>ST</sup> CENTURY TOURISM.

# COMMITMENTS TO 4 STRATEGIC PRIORITIES



- **Diverse Businesses**  
Building business resilience, sustainability and profitability
- **Passionate People**  
Attracting, developing and retaining a skilled, committed, diverse and valued workforce
- **Thriving Places**  
Creating and developing a sustainable destination together
- **Memorable Experiences**  
Providing the very best, authentic and memorable experiences



# A BOLD SET OF OUTCOMES

## Strategic Outcomes

### **Our Diverse Businesses**

We will build business resilience, sustainability and profitability.

- Tourism businesses in Scotland are entrepreneurial, agile and resilient.
- Scottish tourism businesses are committed to sustainable practices.

### **Our Passionate People**

We will attract, develop and retain a skilled, committed, diverse and valued workforce.

- Scotland's tourism sector has created an outstanding workforce, ready to meet the requirements of the 21st century workplace.
- Scotland's tourism sector has adopted Fair Work practices.
- Improved opportunities for career mobility encourages career development across the tourism sector.
- The diversity across the tourism sector is reflective of a modern Scotland.

### **Our Thriving Places**

We will create and develop a sustainable destination together.

- Places across Scotland develop and manage tourism effectively and responsibly.
- Local communities are actively engaged as valued stakeholders in tourism development and delivery.
- A strategic approach to developing the right products in the right places ensures that the whole of Scotland and more sectors of the economy benefit from tourism demand.

### **Our Memorable Experiences**

We will provide the very best, authentic and memorable experiences.

- Scotland's tourism assets are nurtured to deliver high quality, memorable experiences that benefit visitors and the places they visit.
- Visitors are encouraged and enabled to explore more of Scotland throughout the year.
- Scotland is an inclusive and accessible destination, which enables all visitors to travel widely and enjoy the full range of the country's visitor experiences.

# UNDERPINNED BY RESPONSIBLE TOURISM



## Responsible Tourism Commitments

Scotland's tourism sector will make a full contribution to our national ambition to become a net-zero society by 2045.

**Scotland's tourism sector will ensure that tourism leads to improved community wellbeing and nurtures thriving places across Scotland.**

Scotland's tourism sector will ensure the value of tourism to Scotland's economy continues to increase, and delivers shared prosperity for all, by encouraging the right growth in the right areas.



# TOURISM & HOSPITALITY INDUSTRY LEADERSHIP GROUP (ILG)



**PURPOSE:** To provide strategic direction to drive Scotland's ambition to be the world leader in 21<sup>st</sup> century tourism.

- The ILG will champion the national tourism strategy, Scotland Outlook 2030, a key component of the Scottish Government's National Strategy for Economic Transformation (NSET).
- The ILG will provide strategic leadership to help grow the economic value and enhance the benefits of tourism, while delivering the very best for visitors, businesses, and communities.

# WHO IS THE ILG?

- A network of individuals from across the public, private and the third sector. Together, they have knowledge and experience spanning Scotland, the UK and across the globe.
- 19 industry members were all appointed as individuals and not as representatives of companies or organisations.
- 9 organisations also sit on the group.
- Co-Chaired by Ivan McKee, Minister for Business, Trade, Tourism & Enterprise and Marc Crothall, CEO, Scottish Tourism Alliance. Vice-chair is Judy Rae, OnFife Cultural Trust.



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COSLA



SOUTH of  
SCOTLAND  
ENTERPRISE



Scottish Enterprise



Highlands and Islands Enterprise  
Iomairt na Gàidhealtachd 's nan Eilean



Scottish Government  
Riaghaltas na h-Alba



# WHO IS THE ILG?

**Aileen Crawford**  
Glasgow Life

**Andrea Nicholas**  
Green Business UK

**Barbara Smith**  
Diageo

**Benjamin Carey**  
Carey Tourism

**Calum Ross**  
Loch Melfort Hotel

**Carron Tobin**  
Rural Dimensions  
SCOTO

**Chris O'Brien**  
Nevis Range

**Chris Greenwood**  
Moffat Centre

**Debbie Johnson**  
IHG Hotels &  
Resorts (UK &  
Ireland)

**Joshua Ryan-Saha**  
Traveltech for  
Scotland

**Joss Croft**  
UKinbound

**Judy Rae**  
OnFife Cultural  
Trust

**Kat Brogan**  
Mercat Tours

**Kelly Johnstone**  
Springboard Charity

**Leon Thompson**  
UKHospitality  
Scotland

**Melanie Allen**  
Nithbank Country  
Estate

**Michael Golding**  
Visit Inverness Loch  
Ness

**Russell Murray**  
Wilderness Group

**Stephen Duncan**  
Historic Environment  
Scotland

Co-Chair - Richard Lochhead , Minister for Small Business, Trade, and Innovation  
Co-Chair - Marc Crothall , CEO, Scottish Tourism Alliance  
Vice-Chair - Judy Rae, OnFife Cultural Trust



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Highlands and Islands Enterprise  
*Iomairt na Gàidhealtachd 's nan Eilean*



Scottish Government  
*Riaghaltas na h-Alba*

**Industry members are appointed as individuals, they do not represent companies or organisations.**

# WHAT HAS BEEN THE INITIAL FOCUS FOR THE GROUP?

- To consider Scotland Outlook 2030 and ensure its key areas of focus will help us achieve our shared ambition.
- Three meetings have taken place to date the most recent on 14<sup>th</sup> March and we next meet in June.
- Discussions are initially assessing the four strategic priorities Diverse Businesses, Passionate People, Thriving Places and Memorable Experiences. Consideration is being given to the “Bold” set of our 2030 outcomes, do they remain, or should they be adjusted or strengthened?
- This is the start of the process. Further work will be done to determine the steps that need to be taken to achieve the vision of Scotland Outlook 2030.





# SUCCESS WILL BE DETERMINED THROUGH PARTNERSHIP, LEADERSHIP AND **SIX KEY CONDITIONS**



- **POLICY**

Having the right policy and regulatory landscape in place.

- **INFRASTRUCTURE & CONNECTIVITY**

Proactively investing in the right infrastructure, transport and digital connectivity.

- **DIGITAL**

Harnessing the power of technology and data.

- **INVESTMENT**

Ensuring we have access to investment.

- **BUSINESS NETWORK**

Providing a strong support network for our businesses.

- **POSITIONING**

Successful positioning of Scotland and its tourism industry.

A person stands on a mountain peak with arms raised in triumph, symbolizing achievement and collaboration. The background shows a vast, hazy mountain range under a soft, golden sky.

COLLABORATION IS AT THE HEART OF THE ILG

TOGETHER, WE WILL CONTINUE TO WORK  
IN A COLLABORATIVE AND INCLUSIVE  
WAY, TO REALISE OUR ASPIRATION OF  
BECOMING A WORLD LEADER IN 21<sup>ST</sup>  
CENTURY TOURISM.



**THANK YOU!**

**PLEASE FOLLOW AND STAY CONNECTED WITH THE**



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